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# Introducing SOAR (SSI/SSDI Outreach, Access, and Recovery) for Children

Presented by the Substance Abuse and Mental Health Services  
Administration (SAMHSA)  
SOAR Technical Assistance (TA) Center  
U.S. Department of Health and Human Services

February 21, 2019



**SAMHSA**  
Substance Abuse and Mental Health  
Services Administration

## Disclaimer

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# Webinar Instructions

- Muting
- Recording availability
- Downloading documents
- Questions and Answers

# Purpose and Objectives

- Share goals and objectives of the SOAR Online Course for Children
- Learn how SOAR Providers can begin to integrate SOAR for Children into your SOAR initiative
- Outline recommendations for implementing SOAR for Children with your community plans to end family and youth homelessness

# Agenda

## **SOAR Online Course: Child Curriculum and Launching SOAR for Children**

- Kristin Lupfer, MSW, Project Director, SAMHSA SOAR TA Center

## **SOAR in Maryland: A State Lead's Plan of Action**

- Caroline Bolas, SOAR State Lead, Behavioral Health Administration, Catonsville, MD

## **SOAR for Children in Austin: Starting with Me First!**

- Suzie Brady, MMT, Travis County SOAR Local Lead, Integral Care, Austin, TX

## **SOAR Provider Experience with SSI for Children: Julian and Janey**

- Laura Kolb, JD, Staff Attorney, Homeless Advocacy Project, Philadelphia, PA

## **Questions and Answers**

- Facilitated by the SAMHSA SOAR TA Center

# Welcome!

Robert Grace  
Public Health Advisor  
Homeless Programs Branch  
Center for Mental Health Services  
Substance Abuse and Mental Health Services Administration

February 21, 2019



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# The SOAR Online Course: Child Curriculum

Kristin Lupfer, MSW

SAMHSA SOAR Project Director

Policy Research Associates, Inc.

Substance Abuse and Mental Health Services Administration

U.S. Department of Health and Human Services

February 21, 2019



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# What is SOAR?



- A model for assisting eligible individuals to apply for Social Security Administration (SSA) disability benefits
- For individuals who are experiencing or at risk of homelessness and have a serious mental illness, co-occurring substance use disorder, or other physical disabilities
- Sponsored by SAMHSA in collaboration with the Social Security Administration (SSA) since 2005
- All 50 states and Washington, DC currently participate

## SOAR Timeline

- SOAR training and process originally developed for adult SSI/SSDI applications in 2005
- Child SSI Issue Brief released in 2014
- Discussions about SOAR for Children with the SAMHSA Child, Adolescent, and Family Branch begin in Spring 2017
- SOAR for Children Expert Panel is held in September 2017
- SOAR Online Course: Child Curriculum launched on October 31, 2018

# Why SOAR for Children?

- Children and youth experiencing homelessness have higher rates of disability and experience higher rates of mental health problems, developmental delays, and poor cognitive outcomes than their stably housed peers.
- 180,413 people were homeless in 56,342 families with children in 2018.
- There were 36,361 unaccompanied homeless youth under the age of 25 in 2018.
  - Unaccompanied homeless youth are more likely to be unsheltered (51%) than all people experiencing homelessness.

<https://www.hudexchange.info/resources/documents/2018-AHAR-Part-1.pdf>

National Center for Homeless Education, UNC Greensboro (2017). Federal Data Summary School Years 2013-2014 to 2015-2016, Education for Homeless Children and Youth

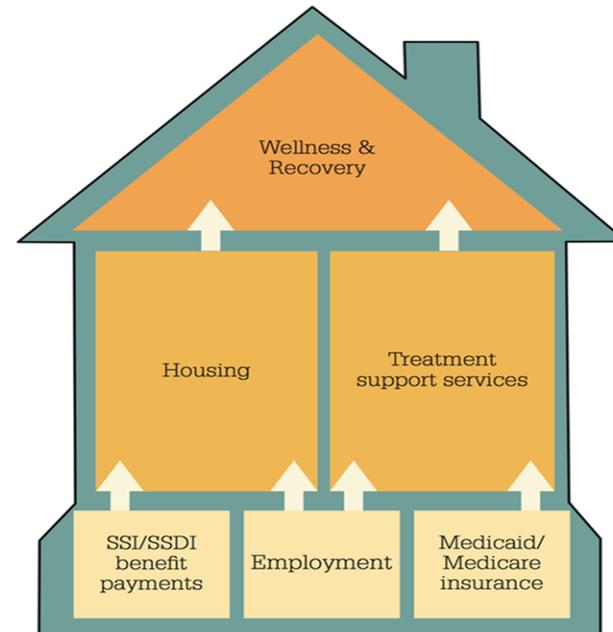
The National Center on Family Homelessness (2011). The Characteristics and Needs of Families Experiencing Homelessness. Retrieved from: <https://files.eric.ed.gov/fulltext/ED535499.pdf>

# A Foundation for Resiliency and Recovery

## More Than Income

- Access to health care and housing
- Increased education and employment opportunities
- Decrease in institutionalization and hospitalizations

## SSI: One Brick in Foundation



# SSI for Children: The Basics

## Supplemental Security Income (SSI)

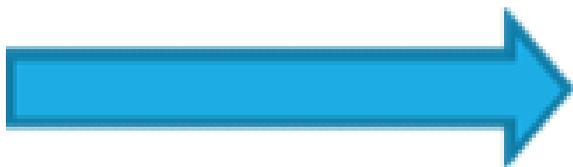
- Benefits for low income individuals
  - Financial need is a complete picture of income, living arrangement, and family resources
- Children who are disabled or blind
- Federal benefit rate is \$771/month (2019)\*
- Provides Medicaid in most states

\*<https://www.ssa.gov/ssi/text-general-ussi.htm>

# SSI Eligibility: Definition of Disability for Children

## Mental health or physical condition(s)

- Diagnosis
- Documentation
- Duration

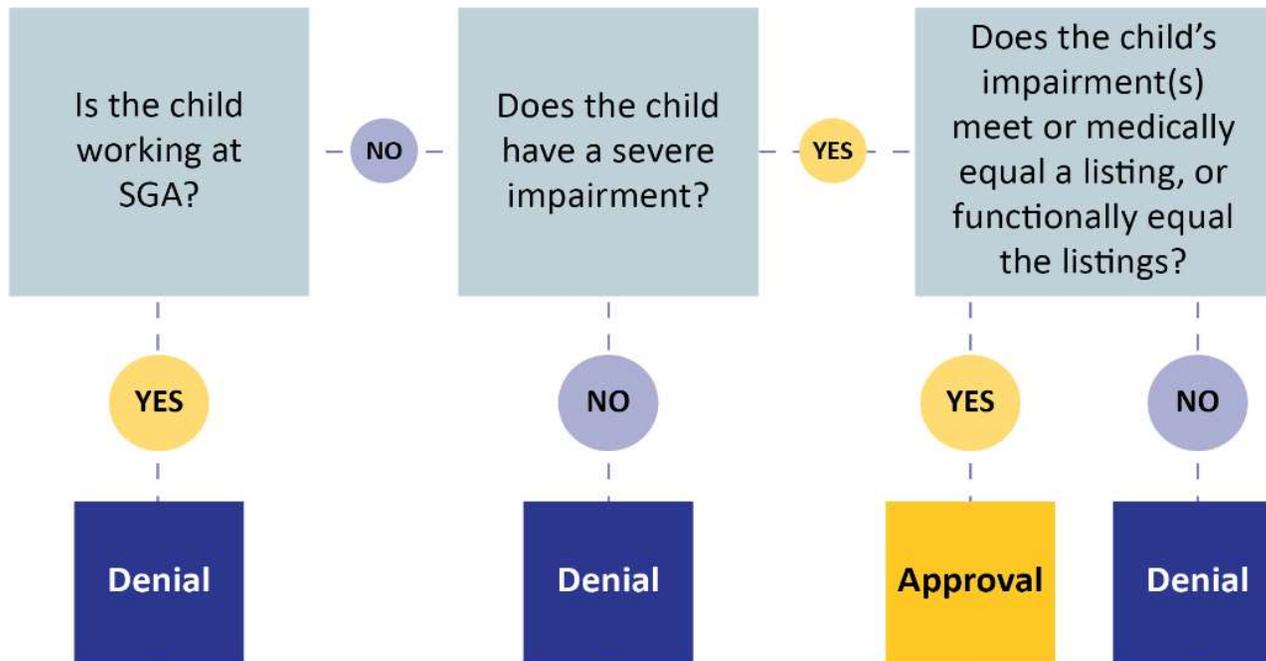


## Functional Impairment(s)

- SSA will determine how the child's functional abilities compare to the functional abilities of a child of the same age who does not have physical or mental impairments.

# Sequential Evaluation for Children

## The Social Security Administration's Sequential Evaluation for Children



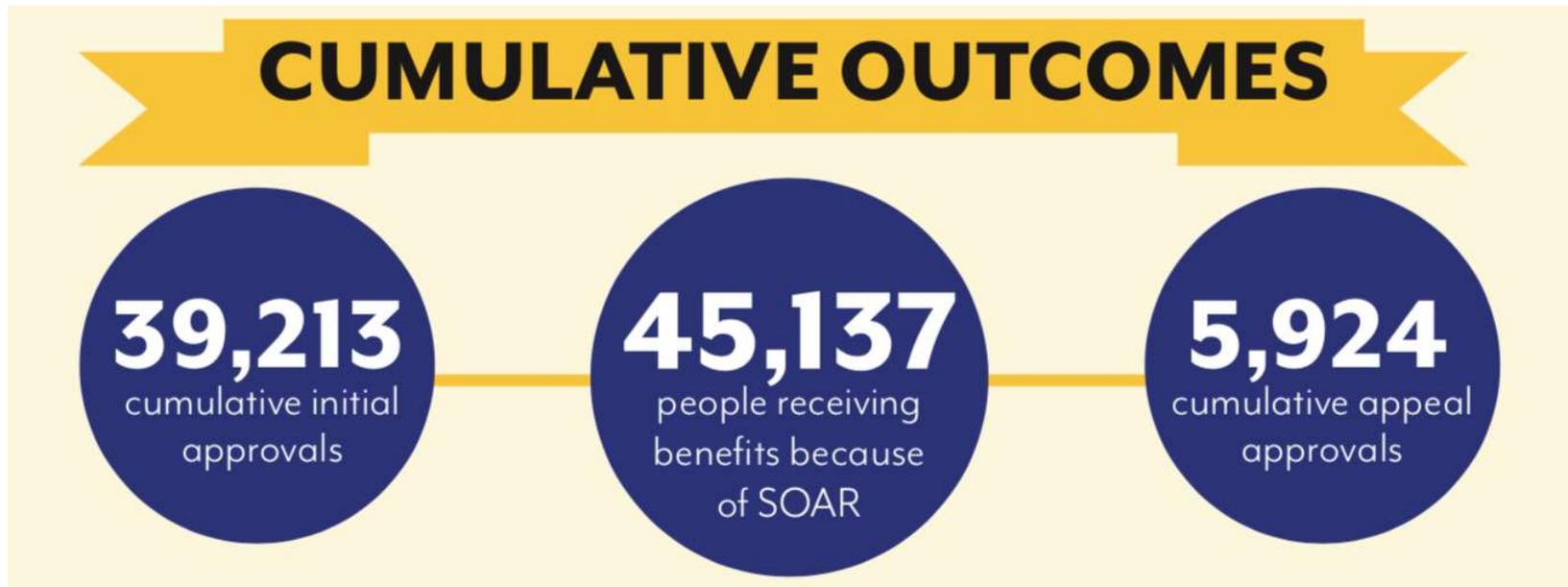
# What Makes SOAR Unique?



SOAR-trained case workers are the heroes!



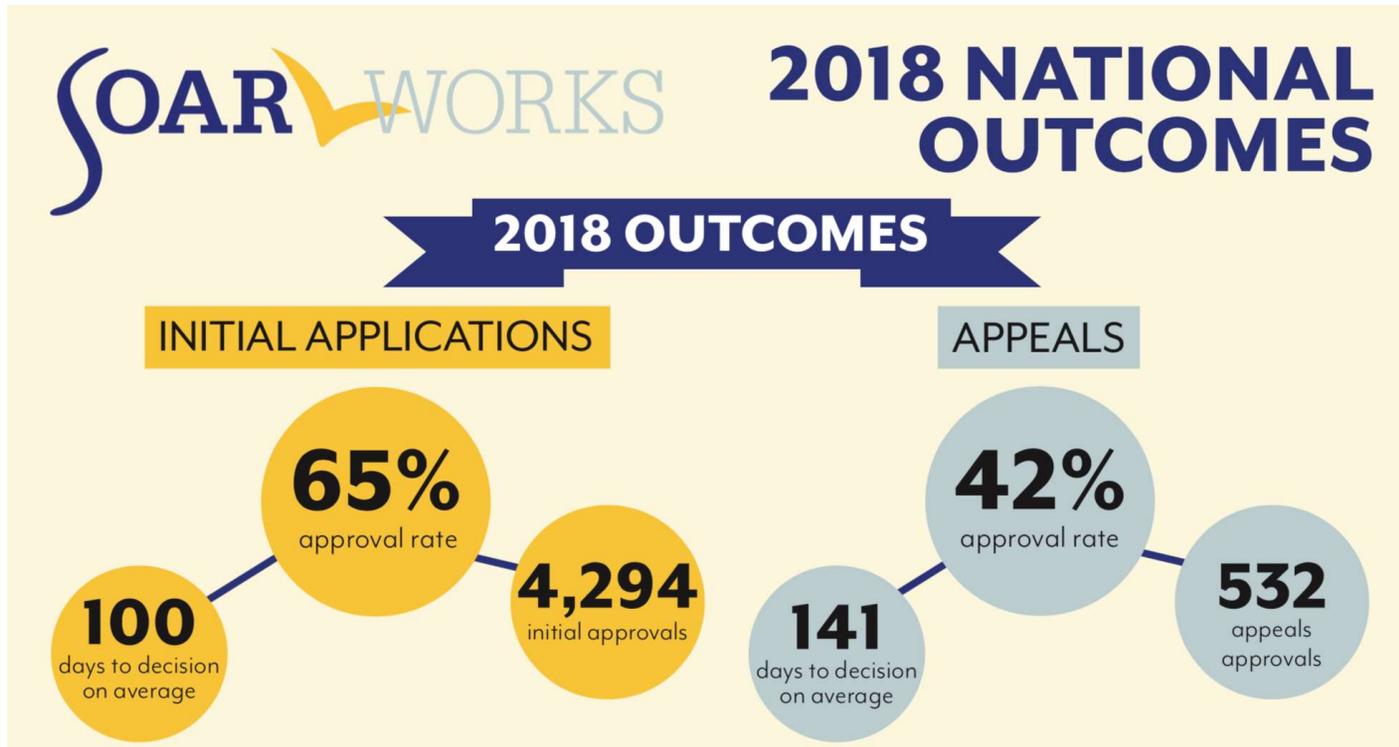
# SOAR Works!



\*National SOAR outcomes as of June 30, 2018

<https://soarworks.prainc.com/article/soar-outcomes-and-impact>

# 2018 National Outcomes



\*As compared to a 29% approval rate for all SSI/SSDI applicants nationwide

SSI Annual Statistical Report, 2017. Table 70. SSA Pub. No. 13-11827. Washington, D.C.: SSA, September 2018

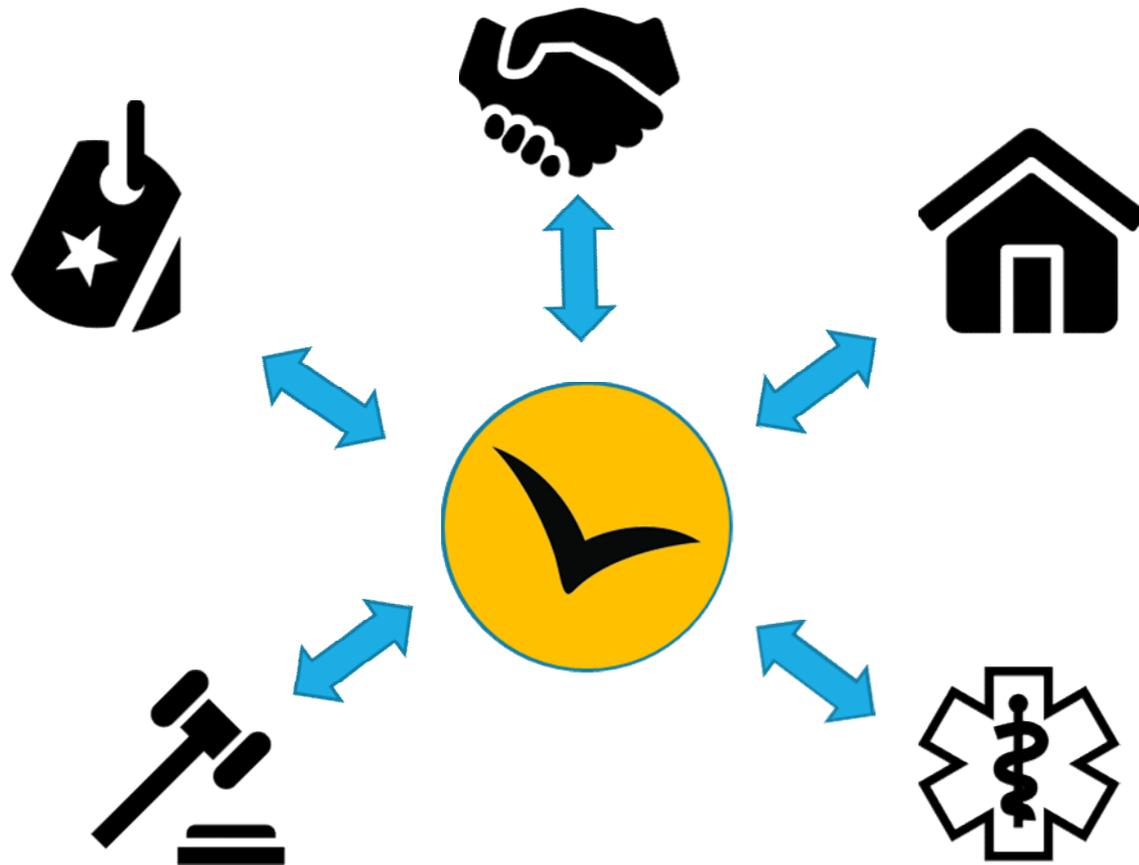
## Child SSI Application Outcomes

- Select providers in Arkansas, Florida, Kansas and Nevada have been implementing SOAR with children
- 368 decisions, 72 percent approval rate\*
- Average of 106 days to decision



*\*Outcomes reported in the SOAR Online Application Tracking (OAT) program*

# Community Collaboration



# SOAR Leadership Structure



## SOAR TA Center

- Facilitates strategic planning meetings
- Conducts Leadership Academies, webinars, & learning communities
- Develops resources, including SOARWorks, the SOAR Online Course, and OAT
- Provides TA at all stages of SOAR implementation



## State Team Lead

- Facilitates state steering committee
- Directs plans to grow & sustain statewide activities
- Serves as liaison to localities
- Maintains relationships with SSA & DDS
- Submits SOAR outcomes to the TA Center



## Local Lead

- Facilitates local steering committee
- Directs local implementation plans
- Facilitates SOAR Online Course cohorts
- Conducts SOAR Fundamentals trainings
- Ensures quality applications & reports outcomes



## Case Manager

- Completes high-quality SSI & SSDI applications using the SOAR model
- Communicates with local SSA & DDS representatives
- Tracks application outcomes

\*OAT: Online Application Tracking Program

\*DDS: Disability Determination Services

\*TA: Technical Assistance

# Oh, the support you will receive!

## SOAR TA Center Activities and Support



# Benefits of the SOAR Online Course



## SSI/SSDI Outreach, Access, and Recovery (SOAR) Online Course: Child Curriculum

- Standardized training provided across all geographic areas
- SOAR Leaders can coordinate follow-up training and support
- Course is FREE, web-based, and self-guided

# SOAR Online Course: Child Curriculum

SSA/SSDI Outreach, Access, and Recovery

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Current course: SOAR Online Course: Child Curriculum

## The Need for SOAR

**Key Lessons from SuperSOAR**  
SOAR is about people, not forms. Success comes from compassion, persistence, and confidence in using SOAR and the tools it offers. You do NOT need to become an expert in SSA regulations or have all the answers.

**Key Lessons from SuperSOAR**  
The SOAR model for completing SSI applications utilizes five critical components that significantly increase the likelihood of an approval for those who are eligible.

### CLASSES IN THIS COURSE

1. **The Need for SOAR**
  - Class Home
  - 1. What is SOAR?
  - 2. SSA: What is Disability?
  - 3. Access to the SSA Disability Program: Players, Roles, and Tasks
  - 4. Steps in the SSA Disability Application Process for Children
  - 5. Disability Determination: The SSA Sequential Evaluation
  - 6. The SOAR Model: Critical Components
  - 7. The SOAR Process: Critical Components in Action
  - 8. Definitions of Homelessness
  - 9. Identifying SOAR Applicants for Children's SSI
  - 10. Social Service Systems: Child Welfare, Children's Behavioral Health and Juvenile Justice
  - 11. SOAR Values
  - 12. Try It: Key Concepts of Class 1
  - 13. Class 1 Conclusion
2. Initiating the Application
3. Exploring Basic Eligibility
4. Medical Information
5. The Link to Functioning
6. Completing the Application Packet
7. Supporting Recovery

### Class Overview

The Need for SOAR provides an introduction to the SOAR model, its values, and the roles and responsibilities of key stakeholders, especially case managers.

- Why SOAR is an important tool for case managers to use when assisting children who may be eligible for SSI
- Important community organizations and stakeholders necessary for a successful SOAR effort and the roles they play
- An overview of SSA's disability benefit program for children, SSI
- An introduction to the critical components of the SOAR model
- Key steps in SSA's disability determination process, also known as the Sequential Evaluation
- An overview of key social service systems: child welfare, children's behavioral health, and juvenile justice
- What values inform the SOAR process

Begin Class

Don't forget to work on your Practice Case at the end of each class.

**Sample SOAR Referral Application: Child**

Please complete in full and fax to: [Contact Person] at \_\_\_\_

Child's Name: \_\_\_\_\_ Date of referral: \_\_\_\_\_

Referring agency: \_\_\_\_\_ Referring staff and title: \_\_\_\_\_

Referral contact number: \_\_\_\_\_ Referral email address: \_\_\_\_\_

**Child's Identifying Information:**

Date of birth: \_\_\_\_\_ SSN: \_\_\_\_\_ Medicaid/Medical Insurance Number: \_\_\_\_\_

Gender: \_\_\_\_\_ Race: \_\_\_\_\_ Language(s) spoken: \_\_\_\_\_

Education (last grade completed): \_\_\_\_\_ Current school: \_\_\_\_\_

Parent/Legal Guardian contact name and number: \_\_\_\_\_

**Part A: Address and Living Arrangement**

Address (street address, city, state, zip code, county): \_\_\_\_\_

With whom is the child living? Check the appropriate selection

<input type="checkbox"/> With parent(s)	<input type="checkbox"/> With friends or other unrelated persons
<input type="checkbox"/> With a relative who is not the child's parent	<input type="checkbox"/> Unaccompanied (by him or herself)
<input type="checkbox"/> With a guardian or foster parent	

Where is the child currently living? Check the appropriate selection

Homeless	At-Risk for Homelessness
<input type="checkbox"/> Outdoors	<input type="checkbox"/> Doubled up/couch-surfing
<input type="checkbox"/> Shelter	<input type="checkbox"/> Received eviction notice or has substantial arrears in rent/utilities
<input type="checkbox"/> Transitional Housing	<input type="checkbox"/> Permanent supportive housing that is grant funded (Housing First placements)
If homeless, how long has the child been homeless:	
Years _____ Months _____	<input type="checkbox"/> Currently in or exiting foster care
	<input type="checkbox"/> Hospital/Residential Treatment/Group Home
	<input type="checkbox"/> Juvenile detention facility

If the child is in a hospital, treatment, or juvenile detention facility, is he/she expected to be released within 30 days?  
 Yes  No      Was he/she experiencing homelessness before entering the facility?  Yes  No

**Part B: Current or Past Applications for SSI**

Has the child previously applied for Supplemental Security Income (SSI)?	<input type="checkbox"/> No <input type="checkbox"/> Yes
What was the decision on the application?	<input type="checkbox"/> Pending <input type="checkbox"/> Denied <input type="checkbox"/> Approved (previously received SSI)
	If pending, is the child working with a lawyer? <input type="checkbox"/> Yes <input type="checkbox"/> No If denied, did the child appeal? Is he/she waiting on a decision? Is he/she working with a lawyer? If the child previously received SSI, please list the dates: Why is the child no longer receiving SSI?

SSI/SSDI Outreach, Access and Recovery (SOAR) Technical Assistance Center
April 23, 2018

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# Practice Cases: Videos and Records



**XYZ Community Shelter**  
*Housing is Healthcare!*

## PROGRESS NOTE

Date: 10/01/2017  
Resident: The Williams Family (Kimberly,  
Marshall and Jessica)

Case Worker: Sandy Jenkins  
Location: Shelter Office

**Some City Youth Mental Health Center**  
*Recovery is Possible!*

## PSYCHIATRIC EVALUATION

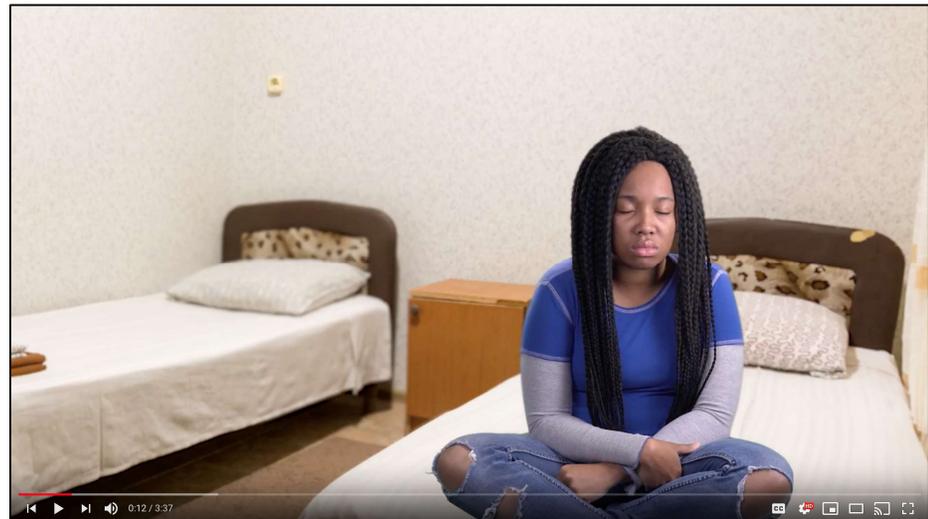
Program Participant: Marshall G. Williams  
Participant ID: 1234567  
Date of Birth: 02/19/2006  
Gender: Male  
Ethnicity: Caucasian

### Diagnosis:

314.01 Attention-Deficit/Hyperactivity Disorder (ADHD)  
300.02 Generalized Anxiety Disorder  
Z55.9 Academic or Educational Problem

### History of Present Illness:

Marshall has a history of ADHD and anxiety and has been taking Adderall daily since



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# Getting Involved: Time Commitment

- Training: 20 hours
- 20-40 hours per complete application
- SOAR Critical Components
- Outcome Tracking
- Benefit to Your Agency and the Individuals You Serve

**SOAR** WORKS **SAMHSA**  
Substance Abuse and Mental Health  
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**Getting Involved with SOAR**  
*You want to be a SOAR provider? That's great! Here's what to expect.*

SOAR promotes recovery and wellness through increased access to Social Security disability benefits for eligible individuals who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder. SOAR providers assist individuals with complete and quality applications. This is not an easy task, and we want to be sure that you understand the commitment required – we believe it is well worth the effort!

**Training**

The SOAR Online Course trains providers to assist individuals with the Social Security disability application process. The course includes an Adult Curriculum for assisting with Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) claims for adults and a Child Curriculum for assisting with SSI claims for children.

- The SOAR Online Course: Adult and Child Curriculums are free and are located on the SOARWorks website (<https://soarworks.prairc.com/content/soar-online-course-catalog>).
- Each curriculum consists of seven classes, each of which has a series of articles, short quizzes, and a practice case component. The practice case provides an opportunity for trainees to apply what they have learned in the course by completing a sample application packet for a fictitious applicant using SOAR techniques.
- It takes approximately 20 hours to complete each curriculum and participants can work at their own pace, starting and stopping as they wish. However, we encourage students to complete the curriculum within 30 days to retain the information learned.
- Upon successful completion, participants will receive 20 CEUs (continuing education units) from the National Association of Social Workers (NASW).

Many SOAR Local Leads offer one-day SOAR Online Course Review Sessions to review key components of the curriculum, discuss local/state practices, and connect new providers to local Social Security Administration (SSA) and DDS (Disability Determination Services) offices.

**Time Commitment**

We estimate that each SOAR application will take approximately 20-40 hours to complete, from initial engagement to receiving a decision on a claim. This generally occurs over the course of 60-90 days.

- The time spent on each application will vary depending on the amount of engagement that is needed as well as other variables such as the experience level of the SOAR worker. For example, engagement with an applicant who is residing in an institution may take 20 hours, while it may take longer to connect with someone who is living outside or difficult to contact.

**SOAR Critical Components**

SOAR providers with higher approval rates credit their success to implementing the SOAR critical components<sup>1</sup> and submitting high quality applications. Use of these components significantly increases the

## Getting Started

- Identify children and youth counterparts with existing stakeholders
  - Ask them for their contacts in each specialty area
- Organize a SOAR for Children Orientation
  - Assess current need and capacity
- Schedule a separate meeting with SSA/DDS to discuss the SOAR process for child SSI claims
- Include youth on your steering committee

## Integrating Child and Youth Providers

- Hold inclusive meetings representing adult and child SOAR stakeholders
- Form workgroups or subcommittees that can focus on special areas/issues as they arise
- Workgroups and subcommittees report back to the full steering committee

# Online Application Tracking (OAT)



All the reasons  
OAT is awesome!



- Web based
- User friendly
- HIPAA compliant
- Monitors quality
- Takes only 3-5 minutes
- It's FREE!

<https://soartrack.prainc.com>

# OAT Case Worker Dashboard



 Dashboard   Applications   Reports ▾   Hi, Sarah Smith (Case Worker) ▾   Logout

**Sarah Smith (Case Worker)** #12100

Agency One • Test City • YY

**30** pending

Apps	Created	Email
202	05/14/2015	ssmith_cw@agencyone.com

**My Initial Outcomes**

Approvals	Denials	Decisions	Days
<b>70%</b> <small>86 Approved</small>	<b>30%</b> <small>37 Denied</small>	<b>123</b> <small>Total Initial</small>	<b>30</b> <small>AVG Days</small>



YY Approvals	National Approvals
<b>85%</b> <small>100 Total</small>	<b>65%</b> <small>53752 Total</small>

**New Applicants**

Applicant ID i

Example: Jane Doe, born in 1985, with a SSN of 123-45-6789. ID = ja85do6789

Create Applicant

**Monthly Snapshot**

0
0

New Apps this Month      Approved Apps this Month

INITIAL	INITIAL
RECON	RECON
ALJ	ALJ
NON SOAR	NON SOAR

Pending Apps   All Apps

---

**Sarah Smith - Pending Applications**

Application Type:  Export CSV

Show  entries      Search:

ApID	PFD Date	App Date	Type	Status	Actions
an58fa2222	-	-	ALJ Hearing using SOAR	PENDING	Continue ▶
dd12ww0345	-	12/14/2016	Reconsideration using SOAR	PENDING	Continue ▶

## Next Steps

- ✓ Learn more about SOAR
- ✓ Get in touch with your SAMHSA SOAR TA Center liaison
- ✓ Reach out to your local or state SOAR leads
- ✓ Register for the SOAR Online Course

## Additional Resources

- SOAR Works Website and Online Course: <https://soarworks.prainc.com/>
- SOAR Outcomes Tracking: <https://soartrack.prainc.com/>
- SOAR Children and Youth Resources: <https://soarworks.prainc.com/article/children-and-youth-resources>
- SSA Disability Information: <https://www.ssa.gov/benefits/disability/>
- SSA Employment Supports: <https://choosework.ssa.gov/>

# SOAR in Maryland: A State Lead's Plan of Action

Caroline Bolas

Maryland SOAR State Lead  
Behavioral Health Administration  
Catonsville, Maryland

February 21, 2019



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## Overview of Maryland's SOAR Program

- Over 1,600 submitted SOAR claims since 2009
- 86% approval rate for initial claims and 77% for appeals
- Quality applications supported in various ways, for example:
  - Integrated online and in-person trainings, SOAR certification, dedicated DDS examiners, local leads and workgroups, state planning group, annual SOAR conference
- Combination of funded and non-funded SOAR-trained case managers

## Key Reflections from Children's Leadership Academy

- My feelings: Daunting, but exciting!
- Opportunity to reflect on how we are currently implementing adult SOAR
- Importance of taking Children's Online Course Curriculum
- Learning community

## Key Lessons from Adult SOAR Program

- What didn't work well:
  - Rushing to train without first undertaking preparation work
  - Having providers submit applications without agreed upon processes in place
  - Training a large number of people regardless of role

## Key Lessons from Adult SOAR Program Cont.

- What worked well:
  - Establishing SOAR in one area at a time
  - Having Local Leads with in-depth knowledge of their communities
  - Focusing on data and celebrating successes
  - Acting quickly to deal with issues/challenges
  - Obtaining agreement from providers on signing Medical Summary Reports (MSRs) and supplying medical records prior to starting SOAR applications

## Initial Reflections on Plans for Children and SOAR

- Importance of integration with existing SOAR program
  - Importance of quality control
  - Importance of building on existing relationships
  - Potential benefits for those parents who do not have a home, but do not qualify for SSI/SSDI themselves
  - Increased potential for serving those age 18 who either did not qualify for SSI or who need an age 18 redetermination
  - Ability to use expertise gained over the years

## Initial Reflections on Plans for Children and SOAR Cont.

- Research!
  - Find out who are the key stakeholders
    - What is their familiarity with SOAR?
    - What will their role be in the process?
- Need and value proposition for SOAR
- Choosing possible pilot site(s)

# Initial Reflections on Plans for Children and SOAR Cont.

- Pilot
  - Identify who will take on role of local lead
  - Plan local stakeholder meeting and agree on who to invite
  - Create a work plan
  - Have attendees participate in development of SOAR processes for their pilot area
  - Obtain buy-in from Agency Directors
  - Be clear this is a pilot, and that we are learning together - SOAR Pioneers!

# SOAR for Children in Austin: Starting with Me First!

Suzie Brady, MMT  
Austin/Travis County SOAR Local Lead  
Integral Care  
Austin, Texas

February 21, 2019



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## Overview of Integral Care and SOAR

- Local Mental Health Authority for Austin/Travis County
- SOAR Co-Lead with CoC SOAR Systems Coordinator
- 14 SOAR-trained employees across 10 different clinics/programs
- 3 full-time dedicated SOAR Specialists
- 1 full-time SOAR Team Lead

## SOAR Child Curriculum and Leadership Academy Thoughts

- Yes, you need to take the Children's Online Course!
  - you won't regret it
- Leadership Academy
  - inspiring and invigorating!
- Importance of Community
  - local/state/national

## Identified Action Plan Steps

- Implementation of SOAR for Children within my agency
  - starting with me first!
- Send out information/interest survey on homeless service provider and SOAR provider electronic mailing lists
- Talk to CoC about incorporating into screening questions for children SSI into our Coordinated Entry system

## Research

- Child/family serving agencies for training and referrals
- Existing SOAR agencies that also serve children
- State Coordinator for McKinney-Vento (located in Austin)
- School-based Therapists within my agency

## Austin/Travis County

- How it fits into Austin's Action Plan to End Homelessness
- Incorporating into 'Youth Homelessness Demonstration Program'
- Identify a child-specific Local Lead for our community

# SOAR Provider Experience with SSI for Children: Julian's and Janey's Stories

Laura Kolb, JD

Staff Attorney

Homeless Advocacy Project

Philadelphia, Pennsylvania

February 21, 2019



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## History of Homeless Advocacy Project (HAP) and SOAR

- 2,880 SOAR claims filed since 2009 with 91% approval rate
- Average processing time of 58 days
- In-house model supplemented with SOAR-trained case managers

## HAP's Current SOAR Projects

- Office of Homeless Services
- Dept. of Behavioral Health (DBH)
- Dept. of Human Services (DHS)
- Justice Project
- Veteran's SOAR
- SAMHSA's Cooperative Agreements to Benefit Homeless Individuals grant (CABHI)

## Child SOAR Expansion

- Next Steps
  - Preliminary discussions with partners and providers
    - Social Security Administration (SSA) field offices
    - Division of Disability Determination Services (DDS)
  - In-house planning
    - Pilot project- goal of 20 children's claims (hopefully Spring of 2019)
    - Funding ideas
    - Outreach plans/ways to generate referrals

## Reflections on Experience Representing Children with SSI Claims

- Takeaways from Children's Leadership Academy
  - Children's claims are different!
  - SOAR Children's curriculum essential to successful claims

# Sharing HAP's Success with Children's SSI

- Julian's Story



- Janey's Story



## Questions and Answers

Please type your questions into the Q&A box on the right of your screen

# Thank You

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

<https://soarworks.prainc.com>

[soar@prainc.com](mailto:soar@prainc.com)

[www.samhsa.gov](http://www.samhsa.gov)

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